

## Message Text

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ORIGIN DEAE-00

INFO OCT-01 EUR-12 EA-10 NEA-10 IO-13 ISO-00 CIAE-00  
INR-10 JUSE-00 NSAE-00 CTME-00 SNM-05 TRSE-00  
ICA-11 NSC-05 OES-07 OMB-01 SIG-03 AID-05 AGRE-00  
/093 R

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EUR/SE:ESMITH (DRAFT)  
IO/HDC:EEDWARDS  
DEA:PBACI

-----114493 130703Z /13

R 122232Z APR 78  
FM SECSTATE WASHDC  
TO AMEMBASSY ANKARA  
INFO AMEMBASSY CANBERRA  
USMISSION GENEVA  
AMCONSUL ISTANBUL  
AMEMBASSY NEW DELHI  
AMEMBASSY PARIS

C O N F I D E N T I A L STATE 094250

E.O. 11652: GDS

TAGS:SNAR, TU

SUBJECT:DEA ESTIMATE OF TURKISH POPPY STRAW PRODUCTION

REFERENCE: GENEVA 04114

1. IN LINE WITH PRIME MINISTER ECEVITS WISH TO KEEP THE  
AREA UNDER POPPY CULTIVATION IN TURKEY IN BALANCE WITH LICIT  
WORLD DEMAND (REFTEL), EMBASSY MAY WISH TO CONSIDER THE  
FOLLOWING INFORMATION COLLATED BY DEA. DEPARTMENT WOULD  
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APPRECIATE EMBASSY COMMENT.

2. NOTWITHSTANDING LOW KEY SUGGESTIONS BY US DELEGATION TO  
GOT OFFICIALS AT RECENT CND THAT GOT CONSIDER BANNING SPRING  
REPLANTING OF WINTER KILL OF 1978 POPPY CROP, TURKISH OFFI-  
CIALS REMAINED UNRESPONSIVE. REPLANTING IS USUALLY ACCOM-  
PLISHED IN MARCH.

3. IN DECEMBER 1977 ESTIMATES WERE THAT FROST HAD ALREADY KILLED 40 PERCENT OF 1978 CROP. HOWEVER, AT RECENT CND SESSION, NUMAN BAYCIN, TMO OPIUM OFFICE DIRECTOR, SAID MORE REALISTIC ESTIMATE WAS 15 TO 20 PERCENT WINTER KILL (GENEVA 02864, PARA. 4). AGRICULTURAL EXPERTS ESTIMATE HECTARES UNDER POPPY CULTIVATION IN TURKEY FOR 1977 AND 1978 CROP COULD RUN AS HIGH AS 50,000 TO 80,000 TONS. ACTUAL

PURCHASES FROM FARMERS IN 1977 REPORTED AT 37,000 TONS. THIS WAS ADDED TO SLIGHTLY OVER 6,000 TONS REMAINING UNSOLD FROM THE 1976 CROP.

4. OF THE 1977 CROP, A TOTAL OF 10,000 TONS HAD BEEN SOLD BY END OF MARCH 1978: 4,000 TONS TO MERCK/USA FOR CONVERSION TO EXTRACT IN HUNGARY AND IMPORT TO USA, AND 6,000 TONS TO THE FIRM OF VPF IN THE NETHERLANDS. OF THAT 6,000 TONS THE CONCENTRATE EXTRACTED FROM ABOUT 1,500 TONS HAS BEEN CONSIGNED TO MALLINCKRODT OF ST. LOUIS. PENICK, THE THIRD U.S. MANUFACTURER WHICH IS THE ONLY ONE WITH A POPPY STRAW EXTRACTION CAPABILITY IS INTERESTED IN PURCHASING 500 TO 1,000 TONS OF TURKISH STRAW DURING 1978 BUT IT IS EXTREMELY UNLIKELY IT WOULD IMPORT MORE THAN 500 TONS, IF ANY OF THAT, BEFORE JULY 1, WHEN THE NEW TURKISH CROP IS DUE.

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5. PHARMACEUTICAL INDUSTRY SOURCES DOUBT TURKEY IS GOING TO SELL MUCH MORE IF ANY OF THE 33,000 TONS IN STOCK AND FACES A 1978 CROP IN JUNE OF AT LEAST THAT SIZE, WITH THE PROSPECT OF SELLING LESS THAN FROM THE 1977 CROP.

6. GIVEN THIS POTENTIALLY ENORMOUS STOCKPILE BY SUMMER 1978 THE NEED TO URGE THE GOT TO DRASTICALLY REDUCE PRODUCTION FOR THE 1979 CROP IS APPARENT.

7. BY LAW, THE GOT MUST DO SO BY DECREE NOT LATER THAN JUNE 30, 1978. IT MAY BE TIME FOR EMBASSY TO CONSIDER RAISING THE POSSIBILITY WITH GOT THAT IT ISSUE A DECREE BY JUNE 30, 1978 WHICH, THROUGH ONE OR MORE OPTIONS OPEN TO IT, WOULD LIMIT THE NUMBER OF HECTARES AND GROWERS LICENSED FOR FALL 1978 PLANTING AND BY SO DOING SUBSTANTIALLY REDUCE THE 1979 POPPY CROP TO A LEVEL EQUAL TO THE ANNUAL 20,000 TON EXTRACTION CAPACITY OF TMO FACTORY AT BOLVADIN.

8. STOCKPILES FROM 1976, 1977 AND 1978 CROPS SHOULD BE MORE THAN SUFFICIENT TO COMPENSATE FOR ANY ONE YEAR POPPY CROP SHORTFALLS. SHOULD THAT OCCUR, THE FOLLOWING YEARS CROP COULD BE APPROPRIATELY EXPANDED TO REPLENISH STOCKS.

FOR 1979, THE GOT SHOULD BE URGED TO LIMIT AUTHORIZED HECTARES TO LEVEL WHICH ON BASIS OF YIELD OF RECENT CROPS IS SUFFICIENT TO PRODUCE 20,000 TONS OF POPPY STRAW.

9. FYI, BECAUSE OF OVERSUPPLY, DURING 1977 SALE OF POPPY STRAW AND CONCENTRATE BECAME A BUYERS MARKET. WITH INCREASING SUPPLIES AND GROWING COMPETITION, BUYERS ARE BUYING JUST WHAT THEY NEED FOR ANNUAL REQUIREMENTS AND MINIMUM INVENTORY ANTICIPATING PLENTIFUL SUPPLY AND POSSIBLE

FURTHER DECLINE IN PRICES ANNUALLY OR AT LEAST STABILITY AND NO INCREASES OR NEED FOR THEM TO TIE UP FUNDS IN INVENTORIES OR BECOME INVOLVED IN ANY LONG TERM CONTRACTUAL AGREEMENTS WITH SELLERS.  
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10. FOR FORESEEABLE FUTURE THERE IS A LIMITED MARKET FOR THE EXPORT OF POPPY STRAW AND CONCENTRATE FROM TURKEY AT ABOUT EQUIVALENT OF 10,000 TONS OF STRAW PER ANNUM. POSSIBILITY OF GROWING COMPETITION FROM AUSTRALIA, FRANCE, SPAIN AND INDIA BEGINNING IN 1978 IS EXPECTED TO MAKE IT DIFFICULT FOR GOT TO MAINTAIN EVEN THIS LEVEL.

11. MAXIMUM IT IS BELIEVED U.S. IMPORTERS WOULD AVERAGE IN NEXT FEW YEARS WOULD BE ABOUT 5,500 TONS OF STRAW OR EQUIVALENT IN CONCENTRATE FROM TURKEY WHICH IS WHAT THEY HAVE OBTAINED THIS YEAR. HOWEVER, BREAKDOWN ON QUANTITIES PURCHASED BY THREE U.S. MANUFACTURERS IS LIKELY TO VARY FROM YEAR TO YEAR.

12. EMBASSY ASSESSMENT WOULD BE APPRECIATED REGARDING THE ESTIMATES HEREIN OF THE 1978 CROP AND EXISTING STOCKPILE AND THE NEED FOR ACTION (PARA. 6). CHRISTOPHER

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## Message Attributes

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